

Hi member! With access to our monthly **STEP Insider**, you receive the latest news about upcoming CPD and networking events, practitioner opportunities, education updates, and more!

Newsletter Vol. 14 | Issue 6 | June 9, 2026

Looking to see what events are taking place this month? Scroll down!



[NEW STEP Canada Website](#)

[STEP Worldwide Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

2025 Volunteer of the Year

Congratulations to **Amanda Doucette, TEP**, of STEP Saskatchewan, on being the 2025 recipient of the Michael Cadesky Volunteer of the Year Award! Amanda was recognized as the volunteer who demonstrated magnanimous voluntary contribution over the past year, the highest honor recognized by STEP Canada.

Amanda's volunteerism and leadership has been on full display since becoming a member in 2018 via the Expertise Route. She is a contributing member of the STEP Canada National Conference Program Committee and the STEP Canada Human Resources Committee, Chair of STEP Canada's Public Policy Committee, Past Chair of the STEP Saskatchewan Branch, and a Director at Large on STEP Canada's Board of Directors. She has authored numerous STEP Inside articles, presented as a speaker and moderator at both local seminars and national conferences, and was recently instrumental at spearheading the application to upgrade the Saskatchewan Chapter to official Branch status - the first transition of it's kind in STEP Canada.



Please join us in thanking Amanda for her contributions and congratulating her on this well-deserved award.

[Learn More About Volunteering with STEP Canada](#)

Your 2026-27 Board of Directors

With a deep appreciation for their vision, dedication, and continued leadership, we extend a proud thank you to our 2026-27 Board of Directors!

As part of STEP's global community, STEP Canada is dedicated to the field of trusts and estates while embracing a distinctive Canadian perspective. The 18 STEP members that make up our National Board are leaders in the trust and estate industry and will assume an instrumental role in communicating the views of Canadian members.



[View the 2026-27 Board Announcement](#)

Your Opinion Matters - Worldwide Member Survey

STEP is committed to giving you the very best member experience, and to do that, we need your help.

By taking just 10 minutes to complete STEP's member survey, you will help us better understand your needs, set our priorities, and improve the services delivered to you. Your feedback will directly influence our work.

The survey will close on **June 14, 2026**. For every survey completed, STEP will make a GBP1 donation to our charity partner, **Alzheimer's Disease International**.

Thank you in advance for sharing your opinions!



Renewal Period for 2026-27 Ending Soon

Thank you to the over **90%** of STEP Canada members that have renewed their membership and confirmed their commitments for 2026-27!

If you haven't yet renewed your membership, this is your final reminder to please complete the renewal as soon as possible to return your membership to good standing. If your renewal is not received by **June 30, 2026**, your membership will be suspended, and all membership benefits (including the TEP designation) or access to your classrooms will be revoked.

If you have any questions regarding your renewal or need assistance, please email memberservices@step.ca.



[Login to Your MY STEP Account](#)

STEP Canada's 28th National Conference

Building Connections, Sharing Knowledge
Online On-Demand Available June 10th

Looking for a convenient and easy way to earn your CPD? Look no further! Register today to have on-demand access to all 19 conference sessions, so you can watch when it works best for you. Experience this year's exceptional program that will unpack current developments, emerging trends, and practical strategies shaping the trust and estate landscape.

"Excellent content and a great way to stay up to date on an annual basis."

On-demand sessions will be available until December 31st.



[Register for Online On-Demand Access](#)

STEP National Webcast -

CRA and STEP Canada: The New VDP (Voluntary Disclosures Program)

Thursday, June 18, 2026
12:00 pm - 1:30pm ET

STEP Canada and the CRA are jointly presenting a national webcast on the Voluntary Disclosures Program (VDP) updated policy, effective October 1, 2025.

This session will provide a practical overview of the VDP changes under Information Circular IC00-1R7, with a focus on how the program can help your clients to correct past tax errors or omissions.

This valuable webcast is offered free of charge for STEP Canada members & students, and will be presented in English.



[Register Today for the Webcast](#)

Upcoming Events Across the Country

Registration Open

STEP Vancouver
June 10, 2026
5:30pm - 8:30pm PT
[Trivia Night & Social Event](#)

STEP Montreal
June 11, 2026
12:00pm - 2:00pm

[Study Session - Summary of the National Conference](#)

STEP Winnipeg
June 11, 2026
6:00pm - 10:00pm CT
[Student Networking Event - Winnipeg Goldeyes vs. Cleburne Railroaders](#)

STEP Calgary
June 18, 2026
4:30pm - 6:30pm
[Student Networking Event - How to Build a Practice: Fireside Chat](#)



Reminder: 2025-26 Branch Bundle registrants will have access to online on-demand replays (where applicable) until December 31, 2026.

Get Ready for an Exciting 2026-27 Program Season

Your branch/chapter boards are excited to share a sneak peak of what's ahead for the upcoming program season! From unique social events to in-depth technical seminars, TEP Talks to student study sessions, and a brand new Full-Day Course (coming Winter 2027), there is an incredible line up in store for you.

Check out our [Event Calendar](#) to see the already-confirmed upcoming events for the next program season - and more will soon be added.

Stay tuned for full event information and registration to launch in August!



Looking for Accredited CPD? We've Got You Covered

Local and National STEP Canada events are designed to meet the continuing education requirements for provincial law societies, governing bodies, and professional associations by offering unique and timely technical content. Members can also fulfill their STEP CPD requirements by attending seminars that align with their reflective development goals.

STEP Canada applies for accreditation, where required, for all relevant paid technical seminars to support its membership and their professional outcomes. [Visit the FAQ section](#) on our website to learn more about CPD accreditation for STEP Canada's events.



If you have questions relating to your CPD certificates or would like more information, please email memberservices@step.ca.

May 2026 Issue of STEP Inside

If you haven't already, jump into the newly released May 2026 edition of STEP Inside, featuring: "**Bill C-15: Key Provisions That Affect 2025 Tax**". Members can find their digital copy available after logging into their MY STEP account.

STEP Canada would like to express a heartfelt appreciation to members of the editorial board, technical reviewers, and contributing authors. We would also like to applaud all 2025 STEP Canada graduates and celebrate those who achieved academic excellence in their courses and programs - all showcased in this issue!

As always, the editorial board welcomes article proposals from all members for future editions at news@step.ca.

Login to Your MY STEP Account



Refreshed Marketing Brochures for Clients

As part of a new national campaign, STEP Canada is aiming to help Canadians identify and understand the STEP designation so they can make informed decisions with confidence.

These marketing brochures, updated in 2025, are designed for you to display in your office or provide to your clients in order to make complicated matters easier for them to understand. They are available only to members of STEP Canada, and all members were sent a sample of each brochure with their physical member renewal kit.

For the cost of printing, only \$5 CAD for a pack of 10 brochures (+ tax and shipping), these brochures provide excellent value for promoting your specialized skillset and supporting clients.



[Learn More About Our Brochures](#)

Practitioner Opportunities

Advertising with STEP Canada's Practitioner Opportunities service offers a highly **cost-effective**, **quick**, and **simple way** to attract the right candidates in this industry - a great resource for connecting the highest caliber of trust and estate practitioners to employers.

Available positions:

[Wills & Estate Lawyers - Linmac LLP \(Toronto, ON\)](#)

[Senior Manager, Legacy Giving & Estate Administration - UNICEF Canada \(Toronto, ON\)](#)



[Learn More](#)

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1-4	All CETA exams are available online on-demand. Must be completed within 12 months of registration.	Registration open on a rolling basis for on-demand exams
NEW: Investment Basics for Fiduciaries (IB) 1-4	Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment.	Registration is open on a rolling basis.
STEP Canada Diploma Program (All Courses)	November 2, 2026	September 1, 2026
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course)	November 2, 2026	September 1, 2026
Essay Submission	October 1, 2026	2026 topics can be found here

Education Program Updates

Diploma exam grades for the May 25–26 sitting will be released on **June 26**. Students will receive an email notification once grades are available on their MY STEP account under "My Courses & Marks."

Students wishing to register for their next course before receiving their grade may complete a provisional registration. The provisional registration form and additional details are available on the course platform under the Exam section.

For students who have successfully completed their program, congratulations on this achievement. Certificates will be mailed out in late summer. Please ensure your preferred mailing address is updated on your profile no later than June 30.

Single Course Registration for Taxation of Trusts & Estates

Full members can now access the second course in the STEP Canada Diploma Program, Taxation of Trusts and Estates. [Login to your MY STEP account](#) to register for this course. This comprehensive course offers you the opportunity to prepare with tax basics or start directly with the trust and estate tax topics. A live virtual case study series and instructor resources are available. If you have questions, reach out to education@step.ca.

NEW Certificate Program: Investment Basics for Fiduciaries (IB)

Designed for trust and estate professionals, this program provides essential investment knowledge for those that administer estates, trusts, and manage the financial affairs of incapable persons. By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance. Registration is on a course-by-course basis. [Read our brochure to learn more.](#)

Connect With Us on LinkedIn

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.



Follow STEP Canada

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).

Reminders

STEP Canada staff work remotely and members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to memberservices@step.ca and our team will forward your message to the right staff member.

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

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